

CONSUMER RESPONSE UPDATE

March 2004: Issue N°25

HIGHLIGHTS

- A year ago, in March 2003 consumer response was negatively impacted by the Iraq war and the emergence of SARS. A year later, use of OTMPC's travel planning sources seem to be returning to historically seen patterns. As a result, we see some strong growth in consumer response in March 2004 as compared to the same months a year ago.
- User sessions with ontariotrail.net totalled 183,920 in March, a growth of 97% over March 2003.
- With five contests live, nearly 16,000 consumers registered with ontariotrail.net in March, the highest number of registrations in a single month since the launch of the web site!
- To the end of March 2004, 130,000 consumers have registered with ontariotrail.net. Of these, 82,700 have opted to receive e-marketing material from OTMPC.
- User sessions with tourismpartners.com increased 138% over March 2003.
- To date, a total of 5,532 partners have registered with tourismpartners.com

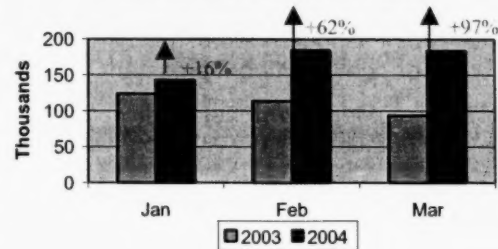
CONSUMER WEBSITE – www.ontariotrail.net

User Sessions

- In March 2004, 183,920 user sessions were recorded at ontariotrail.net, a growth of 97% over the same month last year.
- User sessions with ontariotrail.net were heaviest in volume on March 19 and March 8 when OTMPC's Spring Campaign was advertised on radio and in newspaper ads.
- Use of the consumer web site seems to be returning to historical patterns. Month over month increase in user sessions in the first quarter of 2004 reflects typical seasonal changes, whereas in 2003, the month over month decline was a result of the Iraq war and the emergence of SARS. As a result, significantly more user sessions were recorded in the first quarter of 2004 than in the same period of 2003.

- User sessions in the first quarter of 2004 increased by 55% over the same period last year.

Growth of User Sessions at
ontariotrail.net: Q1 2004 vs. Q1 2003



Consumer Registrations

- 15,913 consumers registered with ontariotrail.net in March 2004. This was the highest registration volume in a month since the launch of the new web site in October 2002.
- The high number of registrations with the consumer web site is largely due to OTMPC's contests that ran online in March. There were 5 contests live in March 2004, as compared to only two in March 2003.

Online Contest Registrations in March 2004

Contest	Contest Date	Registrations in March
Resort	Dec 9 – March 31	3568
Spring	Feb 21 – Apr 2	3552
Adventure	Feb 18(runs to Aug. 1)	3399
Toronto Getaway	March 5-31	6000
Angling	Mar 31(runs to June 30)	44

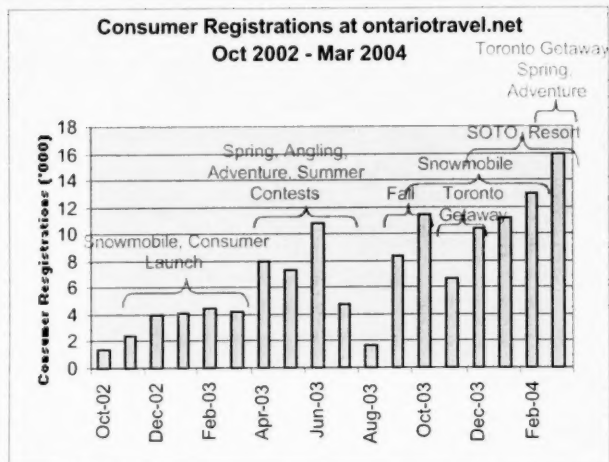
- Of the 15,913 consumers who registered with the web site in March, 9,530 (60%) opted to receive e-marketing material from OTMPC.
- The majority of consumers who registered with ontariotrail.net in March were English-speaking (98%), Canadian (80%) and female (64%).

ONTARIO
Marketing Partnership

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- March registrations brought the total number of consumers who opted to receive e-marketing material from OTMPC to 82,700.



PARTNERS WEBSITE - www.tourismpartners.com

User Sessions

- In March, 7,688 user sessions were recorded at tourismpartners.com, an increase of 138% over March 2003.
- The most downloaded file from tourismpartners.com was OTMPC's Marketing Plan 2004 – 2005 (2,217 downloads).

Registered Partners

- 156 partners registered with tourismpartners.com in March 2004, bringing the total number of registered partners to 5,532.

CALL CENTRE

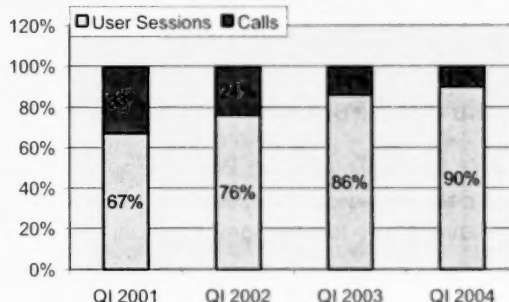
- Calls to the Call Centre in March 2004 totalled 21,023, a slight increase of 4% over March 2003.
- Of calls to the Call Centre in March, 84% originated from Canada, 16% came from the U.S.

- 82% of Canadian calls originated in Ontario,
- 60% of U.S. calls originated in the Border States.

- Following seasonal patterns observed in previous years, calls to the Call Centre increased in March as compared to January and February as a result of increased interest in travel planning after a long winter.

- At the same time, consumers continue to favour using the web for their travel planning. The web site continues to capture an increasingly higher percentage of consumer response than the call centre.

Calls, User Sessions as a Proportion of Consumer Response:
Q1 2001 - Q1 2004

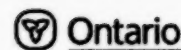


FULFILLMENT CENTRE

- 23,681 fulfillment pieces were requested by consumers in March 2004, a similar amount as in the same month a year earlier.
- However, fulfillment distribution was lower in January and February than it was a year ago, resulting in a 9% decline in the number of pieces distributed in the first quarter of 2004 over the first quarter of 2003.
- Much of the decline came from the international markets, especially the U.S. A slower recovery in these markets and the

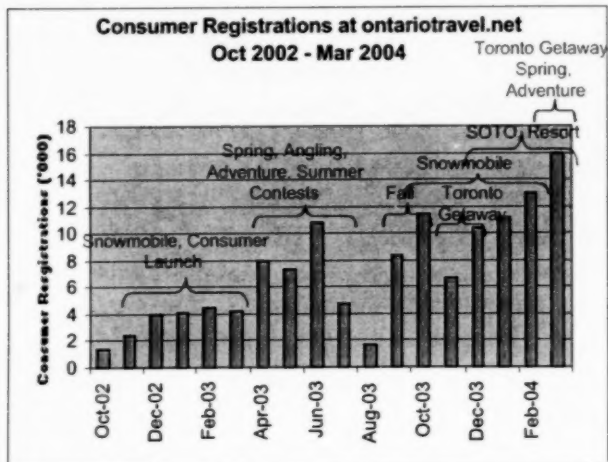
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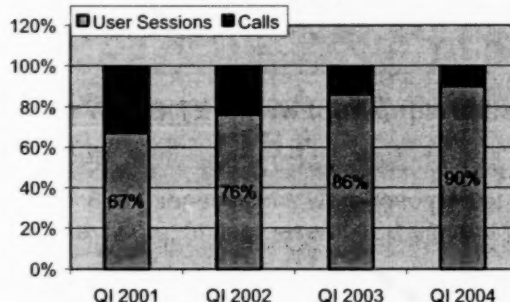
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increasing fear of terrorism seems to negatively impact on consumers interest in even seeking travel information.

Decline in Fulfillment Requests First Quarter 2004 versus First Quarter 2003

Market	Decline in # of Requests	Percent Change
Domestic	1,086	-3%
U.S.	3,666	-22%
Overseas	897	-24%

■ In the first quarter of 2004, 72% of fulfillment pieces were distributed in Canada, 23% in the U.S. and 5% overseas.

■ Of all fulfillment pieces distributed in the first quarter, 16,485 (29%) were ordered online through ontariotravel.net, and the rest through 1-800-ONTARIO.

Top 5 Fulfillment Requests: Q1 2004

	Fulfillment Piece / Guide	Quantity Distributed
1	Ontario Road Map 2003	11,729
2	Ontario Reference Guide 2003	5,956
3	Adventure Guide 2003	6685
4	Ontario Resource Guide 2004	3710
5	Back Roads & Getaways Guide 2003	2450

ONLINE PUBLICATIONS

■ Online publications became popular fast with consumers. There are almost as many online publication downloads as requests for printed publications.

■ In addition to over 23,000 requests for printed publications, consumers also downloaded over 20,000 publications via ontariotravel.net. The most popular download in March was the *2004 Spring Experience Guide* (5,355 downloads).

■ In the first quarter of 2004, a total of 47,649 online publications were downloaded via ontariotravel.net, an increase of 45% over the first quarter of 2003.

Top 5 Online Publications: Q1 2004

	Downloaded Files	Downloads
1	2003 Ontario Reference Guide	14,935
2	2004 Spring Experience Guide	5,355
3	2003 Snowmobile Guide	3,715
4	2004 Winter Events Guide	3,288
5	2004 Ontario Resource Guide	2,672

